CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

MAY 2

CHALLENGES

Cable
INFORMATION AND ANALYSIS FOR CABLE

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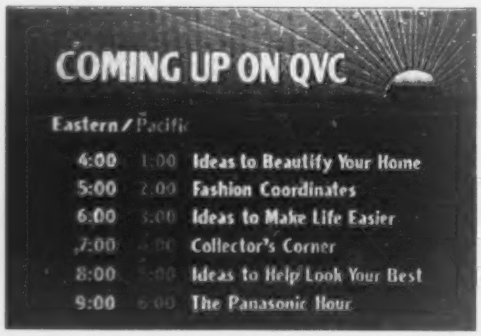
COMING UP ON QVC
Eastern / Pacific
4:00 1:00 Ideas to Beautify Your Home
5:00 2:00 Fashion Coordinates
6:00 3:00 Ideas to Make Life Easier
7:00 4:00 Collector's Corner
8:00 5:00 Ideas to Help Look Your Best
9:00 6:00 The Panasonic Hour

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ABP BPA

What's On The Pays/May

Cinemax

New Movies

TITLE	MPAA RATING	DISTRIBUTOR
A Breed Apart	R	Hemdale
A Time For Killing	NR	Columbia
A Walk In The Spring Rain	PG	Columbia
And God Created Woman	NR	Vestron
Beach Balls	R	Concorde
Border Heat	NR	Monson
Cherry 2000	PG-13	Orion
CHUD II	R	Vestron
Crazy Moon	PG-13	Miramax
Dead Heat	R	New World
The First Deadly Sin	R	Warner Bros.
The Furies	NR	Paramount
Georgy Girl	NR	Columbia
Gothic	R	Vestron
The Howling III		
The Marsupials	PG-13	Vestron
Malombra	NR	Playboy
Manon Of The Spring	PG	Orion
Meatballs III	R	The Movie Store
Police Academy V		
Assignment Miami Beach	PG	Warner Bros.
The Revenge Of Frankenstein	NR	Columbia
Slamdance	R	Island
The Violent Men	NR	Columbia
You're Never Too Young	NR	Paramount

Original Programming/Specials

The Movie Trivia Show

Highlights

Funny Farm	R	Warner Bros.
The Manchurian Candidate	NR	MGM/UA
Sessions: The Neville Brothers		
Tell It Like It Is		
The Seventh Sign	R	Tri-Star
The Electric Horseman	PG	Universal
Fiddler On The Roof	G	MGM/UA
Flower Drum Song	G	Sam Goldwyn
The Great Waldo Pepper	PG	Universal
The Haunted School	NR	Revcom
Jack The Giant Killer	NR	MGM/UA
Jeremiah Johnson	PG	Warner Bros.
Kidnapped	G	Disney
Million Dollar Mermaid	G	MGM/UA
The Natural	PG	Columbia
Princess Kate	NR	Revcom
Prisoner Of Zenda	NR	Turner
The Reluctant Astronaut	G	Universal
Snoops, Come Home	G	CBS
The Wings Of Eagles	NR	MGM/UA

Original Programming/Specials

The Estate Sale
Teen Wits, Lose Or Draw (new series)

Highlights

The Adventures Of Johnny Jones	NR	Miramax
Calgary '88—16 Days Of Glory II		
Just Like Family (new series)		

The Disney Channel

New Movies

TITLE	MPAA RATING	DISTRIBUTOR
Barnum	NR	Hal Roach
Chad Hanna	NR	20th Century-Fox
The Dirt Bike Kid	PG	Worldvision

HBO

New Movies

TITLE	MPAA RATING	DISTRIBUTOR
A Time Of Destiny	PG-13	Columbia
Bad Dreams	R	20th Century-Fox
Big Bad Mama II	R	MGM/UA
Born To Race	R	MGM/UA
Casual Sex	R	Universal
Deadly Illusion	R	Cinetel
The Dog Who Stopped The War	G	Miramax
Fatal Beauty	R	MGM/UA
Funny Farm	PG	Warner Bros.
Good Morning, Babylon	PG-13	Vestron
Illegally Yours	PG	MGM/UA
The Invisible Kid	PG	Taurus
Maniac Cop	R	Shapiro

Mayflower Madam	NR	Hal Roach
My Best Friend Is A Vampire	PG	Kings Road
Nasty Hero	PG-13	Orbis
The Outing	R	The Movie Store
Police Academy V		
Assignment Miami Beach	PG	Warner Bros.
Private Road	R	Trans World
Return Of The Living Dead II	R	Lorimar
Savage Streets	R	Vestron
Scared Stiff	R	Fremont
Shakedown	R	Universal
Sunset	R	Tri-Star

Original Programming/Specials

Family Playhouse: What If I'm Gay?
Nature Watch (new series)
On Location: Rodney Dangerfield Opening Night At Rodney's Place

Highlights

How To Raise A Drug-Free Child
Not Necessarily The News (new format premiere)
Robert Townsend & His Partners In Crime III
Third Degree Burn

The Movie Channel

New Movies

TITLE	MPAA RATING	DISTRIBUTOR
Bad Dreams	R	20th Century-Fox
Big Bad Mama II	R	MGM/UA
Bloodsport	R	Cannon
Castaway	R	Cannon
Casual Sex	R	Universal
Cherry 2000	PG-13	Orion
Cold Steel	R	Cinetel
Cyclone	R	Cinetel
Hollywood Uncensored	NR	Castle Hill
Lady Beware	R	Video Media
Lucky Jim	NR	Viacom
Maid To Order	PG	Catolco
Making Mr. Right	PG-13	Orion
Number One With A Bullet	R	Cannon
Rolling Vengeance	R	Apollo
Scarecrows	R	MCEG
The Scoundrel	PG	Universal
South Of Reno	R	Castle Hill
Summer Heat	R	Atlantic
Three Men And A Cradle	PG-13	Sam Goldwyn

Original Programming/Specials

Firstworks: Susan Stedelman

Highlights

Colors	R	Orion
Lady In White	PG-13	New Century/Vista
Sunset	R	Columbia
Three Men And A Baby	PG	Touchstone

Showtime

New Movies

TITLE	MPAA RATING	DISTRIBUTOR
The Brass Ring	NR	Film Gallery
Casual Sex	R	Universal
Classified Love	NR	CBS
The Couch Trip	R	Orion
Down Twisted	R	Cannon
The Hanoi Hilton	R	Cannon
House Of Games	R	Orion
Lady In White	PG-13	New Century/Vista
The Longest Night	NR	Universal
Macaroni	PG	Paramount
Making Mr. Right	PG-13	Orion
Never Con A Killer	NR	Columbia
Our Family Business	NR	Warner Bros.
Peter No-Tail In America	G	Atlantic
The Quest	PG	Miramax
The Savage Innocents	NR	Paramount
Shakedown	R	Universal
Some Kind Of Wonderful	PG-13	Paramount
Stormy Monday	R	Atlantic
Street Smart	R	Cannon
Tail Of The Tiger	NR	Miramax

Original Programming/Specials

Brothers (final original episodes)
Frank, Laza & Sammy: The Ultimate Event
Pink Floyd: The Delicate Sound Of Thunder

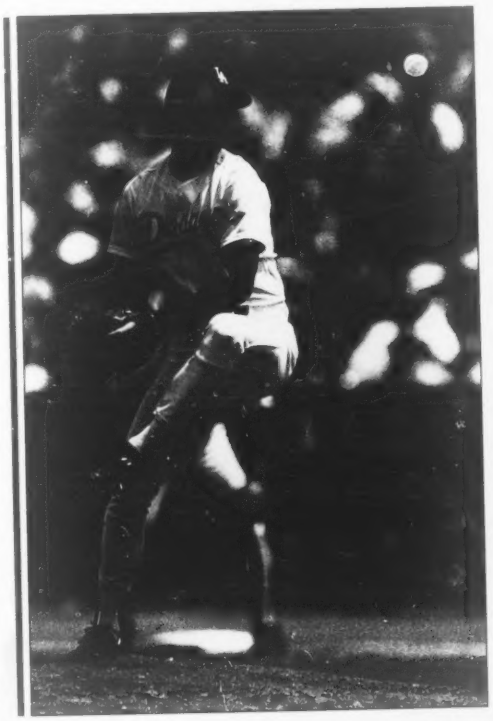
Highlights

Brothers (final original episodes)

Colors	R	Orion
Hairspray	R	Universal
Three Men And A Baby	PG	Touchstone

Exploding the perception that cable is stealing baseball

By Wayne Friedman



Los Angeles Dodgers pitching ace Oral Hershiser is now a Z Channel attraction

Baseball's wholesale swing to cable is more hysteria than a hit.

Cable, TV station and baseball club executives don't believe that baseball will become strictly a "pay" television proposition anytime soon. The national pastime, these executives agree, will co-exist on TV stations and regional cable networks for years to come. The reality is that advertising time both for stations and local cable affiliates has been growing concurrently.

The New York market has been the prime instigator in creating this station-to-cable exodus story, says Bill Aber, vice president and general manager of Washington-based regional cable channel Home Team Sports. But he says it isn't true for the U.S. marketplace as a whole. "Things that happen in New York are not always the same things happening across the country," Aber says wryly.

Still, developments in the nation's largest market have created the perception among newspaper critics, fans and now politicians that there is a threat that cable is stealing baseball. For the last couple of years, the fight for the television rights to Yankees games has given New York cable operators a couple of black eyes. The Bronx Bombers' previous cable outlet, SportsChannel, forced the club to reduce the number of games on WPIX-TV from about 100 to around 50. This transpired while SportsChannel increased the number of its Yankees games from 40 to 100. Litigation followed the usual rash of accusations from fans and the team.

Next came MSG Network. Last December it agreed to buy 12 years worth of New York Yankee baseball for $500 million—the first time ever a local baseball team sold all its rights to a cable entity. In the short term, however, the Yankees will honor its ongoing contract with WPIX, allowing the station to air 75 games this season and next. MSG also will air 75 contests for the next two seasons, but starting in 1991 all rights will be owned by MSG.

The reality of the situation is that neither New York nor the rest of the country appears to be in a race for moving all local over-the-air baseball games on stations to regional cable networks. The financial structures and overall marketing strategies have kept and will keep clubs in a two-outlet television strategy—broadcast and cable.

The hard truth is that the number of baseball games on cable and TV stations has risen over the last few years. This year, 1,647 games will be aired on local TV stations, up 13 games from the year before. Local cable telecasts are at 1,061 games this season, up 31 from the year before.

Stations are not only seeing a rise in the number of games, but also in viewership. This defies the general television trend in which broadcast viewing shares are declining at the expense of cable. Ratings have climbed from an 11.8 Arbitron average of 20 reporting baseball markets in 1984, to a 12.5 number in 1987 to a 13.0 last year.

While the number of baseball games on cable has, indeed, grown

significantly over the last few years—from 820 games in '84 to 1,061 this year—those extra games haven't necessarily been siphoned from over-the-air stations. That's because many teams who have added cable packages in recent years, with the exception of New York, simply have added home televised games to the mostly away-game package that broadcast stations run. In some cases, where local stations are network affiliates—and thus are contractually limited in preemptions—cable has also benefitted.

> 'Things that happen in New York are not always the same things happening across the country.'
>
> *—Bill Aber, vice president, Home Team Sports*

"We have maintained the number of over-the-air games because we are using it as a marketing tool to sell our product," says Jim Winters, director of broadcasting for the San Diego Padres. The Padres are the only team that retains over-the-air television rights in order to sell a package of advertising product to clients, including signage, radio and promotion.

The Padres also work in partnership with Cox Cable on a pay-per-view network. In contrast with its station exposure, Cox, not the Padres, sells all advertising. Why? "You are not talking about a great number of (PPV) dollars," says Winters. "And our plate is pretty full." Since 1986 the Padres basically have kept the same split on its games. This year the team will have 51 over-the-air and 41 cable telecasts.

Some teams actually have increased the number of over-the-air games as compared to cable. The San Francisco Giants added 10 games to KTVU-TV's lineup this year, while the 36 games on its Giantsvision pay-per-view service remained the same. The St. Louis Cardinals have grown from 44 over-the-air games two years ago to 56 last year, to 60 this year, while its pay-per-view network has stayed in a 50-game season format since 1986. Thanks to the MSG Network deal, the New York Yankees' station exposure also will jump from 53 to 75 games, while cable exposure is reduced from 100 to 75.

Although both stations and cable have grown consistently over the last few years, cable could be moving at a faster pace in the next few years by adding markets. Out of the 20 baseball markets, there are six in which there is no cable exposure—Kansas City, Cincinnati, Oakland, Seattle, Milwaukee and Cleveland. Not surprisingly, existing cable networks and budding regional cable channels are looking into grabbing up some of those rights.

It will be hard going in Seattle. The struggling Mariners opted for exclusive over-the-air exposure with 60 regular season games airing on KSTW-TV for the next three seasons. TCI of Seattle and Viacom, two of the area's larger systems, had been vying to wrest control of the Mariners for a cable-only exposure that would have started with the current season.

That's not what the Mariners wanted, says Bill Knudsen, vice president of marketing and sales for the team. It demanded that at least 25 games up to a maximum of 65 be shown by an over-the-air station. So TCI went looking for a station partner but couldn't reach an agreement with any. Why not? Knudsen doesn't know "other than, I guess, the normal competitiveness of over-the-air television with cable." Still, Knudsen would like to deal with TCI for a cable package in the future.

The Oakland Athletics, which have a unique two-station contract with CBS affiliate KPIX-TV and independent KICU-TV, are close to striking a deal with the newly-formed Bay Area Sports Network, according to David Rubinstein, president of SportsSales, which represents the team.

Rubinstein says that cable will provide additional revenue through incremental games. There are no plans to take away over-the-air games. "As far as the public is concerned, I think we are providing a wonderful service (if we can add more games)," says Rubinstein. "All they have to do is watch 8,000 Budweiser commercials," he jokes. "That's a small price to pay."

The Cleveland Indians already have received offers from the new SportsChannel Ohio regional cable network and from Prime Sports Network, the Denver-based new regional that has associations with Texas-based Home Sports Entertainment and Florida's Sunshine Network. Dennis Lehman, vice president of operations for the team, says "We've been talking about it. There's a 50-50 chance of doing it this season." The Tribe will broadcast 50 road and 10 home games on WUAB-TV for 1989. As far as cable is concerned, Lehman doesn't see any conflict: "We can all live together. It gives the club additional impressions and exposures."

The Milwaukee Brewers are also in the hunt. Bill Haig, vice president

> 'We have maintained the number of over-the-air games because we are using it as a marketing tool to sell our product.'
>
> *—Jim Winters, director of broadcasting, San Diego Padres*

of broadcast operations, says he is seeking a cable alternative. "We are exploring those possibilities," he says. "It's a matter of making the proper economic deal."

A more cautious mindset exists at the Kansas City Royals. Dennis Cryder, the team's vice president of marketing and broadcasting, is in no rush to move on cable. A few years ago the Royals did have a cable package with the now extinct Sports Time service, running 52 cable games in 1984. One regional cable programming executive senses that because the Royals were hurt financially from that deal, that they are not quick to move now. Cryder counters that the Royals did, in fact, benefit financially.

Prime Sports Network has had discussions with the Royals, but Cryder decided to put cable on hold. "At the present time, based on what's happening on the national level with the ESPN package, 1989 would be a lame duck year. Therefore, we opted to see what's in store for baseball and the club next year," Cryder says.

ESPN is indeed a concern to operators who sell local cable games, as well as to station executives. With ESPN's 175 games coming into all the markets throughout the season, the hope is that there won't be a glut of inventory. The affect, says Dick Barron, executive vice president of Home Sports Entertainment, is "going to be something, but not very significant."

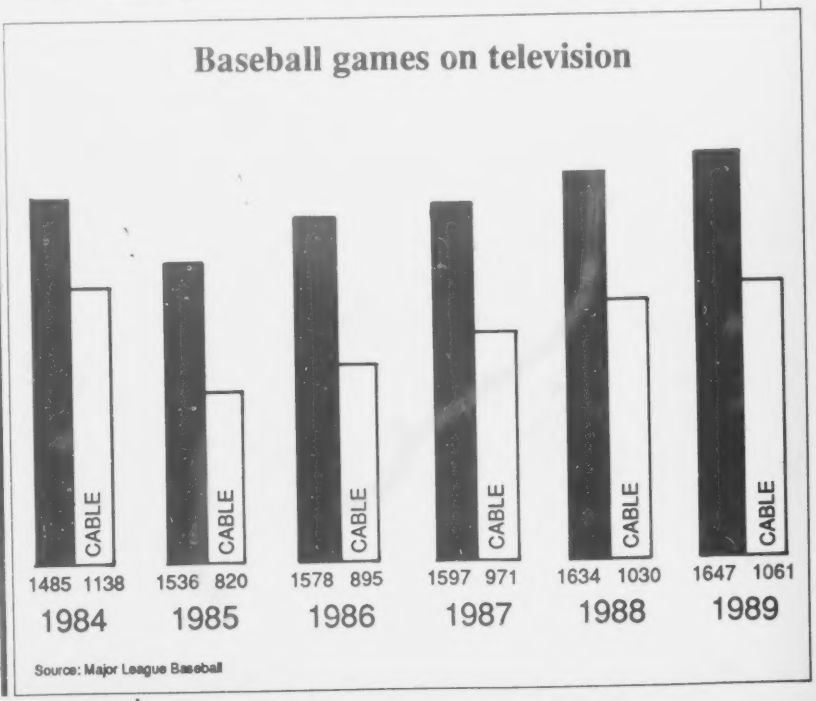
HTS's Aber says the elimination of NBC's 30-odd Saturday afternoon games and the introduction of 13 CBS Saturday afternoon games and ESPN's 175-game schedule starting next year means only positive things to cable networks and operators who sell local time.

"It's a net plus that I have only ESPN as competition," he says, because ESPN's games are mostly non-exclusive. Aber says now that the Saturday afternoon time slot is partially available, it could mean an opportunity for cable networks to air more games on that day. Bill Crowell, general manager of the Cable Advertising Network of Greater St. Louis interconnect, also sees benefits. "We'll be able to package St. Louis Cardinal baseball with ESPN's games," he says.

A few station general managers aren't happy about this scenario. Kevin O'Brien, vice president and general manager of KTVU-TV San Francisco, which recently signed a multi-year contract with the Giants, has been outspoken about the impact of the ESPN package. "There is no question that this is going to have a negative impact on the unit price we get for baseball, simply because you are tripling the amount of available inventory for baseball," he says.

Don Stuart, president of The Baseball Network, an "unwired"network that buys time from stations' televised baseball games, believes just the opposite. "I think ESPN entry into the baseball market will *increase* revenue. Advertisers, instead of looking at other sports, will go to baseball."

Working against ESPN is the popular notion that, whether on cable or on stations, baseball is a



local sport. It draws a higher percentage of local viewers than any national game can during the regular season.

Detractors are keenly aware of this, and say that is why both ABC and NBC did not bid aggressively for nationally televised baseball, leaving the field to ESPN and CBS, which have four-year contracts starting next season. National broadcast ratings slipped from a 9.4 Nielsen NTI average in 1986 to a 8.0 last year for ABC. NBC also witnessed a numbers drop, from a 6.4 in 1986 to a 5.6 last year. What the networks learned is that viewers have been moving more toward local games than national ones in which they have limited interest.

Advertisers predict that, because of these viewership realities, ESPN—except perhaps for its exclusive Wednesday night window—will be bringing in not more than a 1 to a 3 rating in its cable universe. That would hardly be a threat to over-the-air outlets that average 10 to 20 ratings for an entire ADI.

Norm Andrus, general sales manager of the Bay Area Interconnect, says about the incursion of ESPN games, "it's . . . hiccup." With $400 million total television dollars in the Bay Area marketplace, the interconnect grabs about $10 million a year. This compares to $75 million that KTVU-TV generates and $60-$70 million that CBS affiliate KPIX-TV sells. He sees the money as incremental income.

Bob Bubeck, general manager of the Greater Philadelphia Cable Interconnect, agrees. "No, I don't think it'll do significant damage (locally)—maybe for the NBC affiliate (KYW-TV) that's traditionally picked up some dollars on Saturday afternoon." Bubeck says if one car dealer has a lock on the over-the-air station, it might give another dealer a chance to play in local baseball.

"I don't see it generating new advertising categories because (baseball) is on ESPN," adds Crowell. And will it hurt KPLR-TV in St. Louis? "Frankly, no." But upon further inspection, Crowell does admit: "We might get into their knickers a little bit."

> 'As far as the public is concerned, I think we are providing a wonderful service (if we can add more games). All they have to do is watch 8,000 Budweiser commercials. That's a small price to pay.'
>
> *—David Rubinstein, SportsSales, which represents the Oakland Athletics*

The ESPN package of 175 games offers two minutes an hour of local advertising time to cable operators, the same quantity that systems usually receive from the sports network. While Andrus appreciates being able to sell two minutes of baseball spots locally from ESPN, it plainly isn't enough. "That's nothing," he says. "I can only sell two car dealers in an hour." As compared with KTVU's local games, "they got a (commercial) break after every inning," he says. "I don't." That means far more packaging and promotion opportunites. He also says many national advertisers like to buy multiple spots during a game.

"Four minutes of time would be fabulous, because there would be enough inventory time for the local, regional and national (cable) companies to co-exist," says Bubeck. "With two minutes an hour it's going to be a tough co-existence with all of them... because you are only talking about five minutes a game." Bubeck isn't complaining, though: "It's better than nothing."

What Major League Baseball has done with its current strategy of boosting local and national games is to provide for a greater advertising base from which to draw revenue, to help fund the explosive growth of players' salaries and to fill owners pockets. It doesn't really matter where the dollars come from. "The owners sit on both sides of the fence," says Pat Twyon, vice president and director of sports for television sales rep firm Petry Television.

Right now, says HSE's Barron, even if the regional network wanted to it couldn't afford to buy all TV rights to its local baseball clubs. Also, "(The public) needs to see the game... and if we put them all on cable, then we hurt the gate... It's a great promotion tool—broadcast and cable. Why deny (owners) part of it?"

MSG already is in this position of total television rights ownership. Bob Gutkowski, executive vice president of MSG Communications Group, says it is probable that games will be sold to WPIX after the initial two-year, 75 games a year period is up.

But MSG doesn't want to rush into any kind of 12-year over-the-air deal right now. "We don't know," he says. "It's too early right now, and we've got the Yankees for a long time." ■

The CABLE POLL

Midwest CATV & CableVision Magazine

Few fear losing business to telcos

More than half of all cable operators do not believe the telephone company in their area is interested in entering the cable business, and the operators said that if they do have to compete with the telco, only about one in four fear they would lose business.

Interviewed for the Cable Poll©, operators most frequently mentioned improvements in customer service as the best tactic to withstand the competitive threat from telcos and possibly other video providers, a factor cited in 35 percent of responses. Enhancements in the number and selection of channels offered was the next most frequently proposed strategy of meeting a competitor and was cited by 31 percent of those interviewed. Interestingly, improving service reliability and better picture quality were cited by only a handful of operators as the best tactics to employ in confronting a challenger, cited by 15 percent and 14 percent, respectively, of respondents.

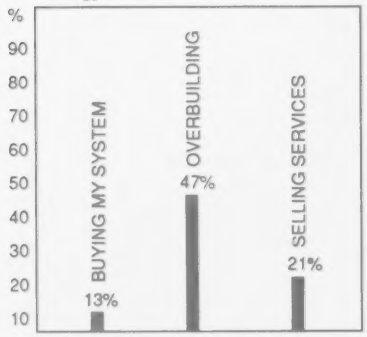
Overall, only 40 percent of operators interviewed said they believe the telephone company in their area is interested in entering the cable business in some fashion, but of that group nearly half (47 percent) said the telco likely would attempt an overbuild. Twenty-one percent saw the expected telco entry in the less threatening manifestation as the provider of services to the cable system, while 13 percent of those who expect telco entry said the foray probably would come in an attempt to buy their system. However, 31 percent of operators at systems with more than 50,000 subscribers believe the telco inroad would be by buying their system.

Number 4 in a series of ten

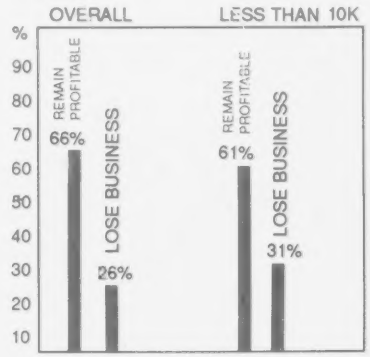
The Cable Poll© is a sampling of industry opinion conducted on a regular basis by Ryan/Samples Research Inc. for Midwest CATV and *CableVision* magazine. Telephone interviews for this edition of the poll were conducted March 13-23; a total of 400 interviews were completed using a listing of system management personnel obtained from CableFile. Cable Poll© researchers are 95 percent confident that the results are accurate within plus or minus 4.9 percentage points.

Asked if their local telephone company were allowed to compete with them in providing cable service, 66 percent of all respondents said they believed that their system would continue operating profitably. Only 26 percent said they thought that they would lose business to a competing telco. Interestingly, that division of opinion mostly remains the same whether the operator questioned ran a large, medium or small system, or whether he or she ran a system owned by a large or small MSO. To the degree there is a greater fear of losing business to a competing telco, it is by operators at systems with less than 10,000 subscribers. In that category, 30 percent said they would lose business. ■

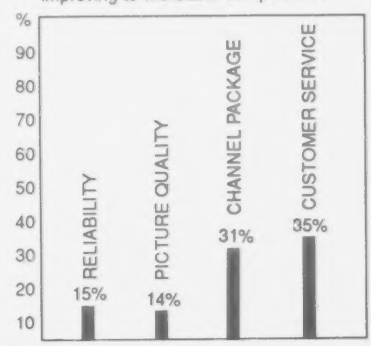
What do you think is the telephone strategy?



How would you fare competing with a telco?



What areas of your system need improving to withstand competition?



QUARTERLY EARNINGS REPORT

Dollar amount in thousands

Company (Quarter Fiscal Year)	Revenues	%Change	Operating Profit	%Change	Net Income	%Change
Capital Cities/ABC (1st/89)	$ 1,120,441	-13	$ 163,835	-1.8	$ 82,773	15
C-Cor Electronics (3rd/89)	14,337	33.9	1,155	51.7	1,155	98.7
Centel Cable (1st/89)	42,800	14.3	6,160	20.5	2,159	16.3
Jones Spacelink (3rd/89)	19,393	2	9,167	42	-1,229	-116
Knight-Ridder (1st/89)	540,744	9.4	58,503	5	20,489	-39.3
Media General (1st/89)	149,266	-19.7	10,971	-39.9	11,891	5.5
Scientific-Atlanta (3rd/89)	134,945	5	15,095	20	9,661	24
Times Mirror (1st/89)	846,895	8.5	117,284	7.6	68,787	8.4
United Cable (3rd/89)	77,936	18	-1,322	22	-1,207	38
Washington Post (1st/89)	341,877	6	66,896	31.9	41,500	-71.3
Zenith Electronics (1st/89)	674,500	17	-3,500	-131.4	4,000	-90

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HBO's Abraham wouldn't say whether any programming ventures will emerge from this promotion, but separate deals are certainly possible. "I'm not saying the system preview is a bridge to that, but why not? If we can produce programming for non-competitive outlets. Why not? It's good for us, and it's good for them." ■

Financial/Stocks

• **Clifton Gardiner & Co.** has arranged $1.2 million in financing for Capital Cable, an operator based in Columbus, Ohio. Funds were provided by Merchants National Bank & Trust Co. Capital will use the money for credit and other purposes.

• **Merlin Cable Partners** has received a senior credit line through Phoenix Cable Inc. for two Maine newbuilds. The franchises in question will pass about 1,500 households in Aroostock and Washington counties. The exact amount was not released. Merlin holds contracts for other areas in the state which cover more than 3,000 homes.

Acquisitions

• **Acton Corp.** will exit the system ownership scene by the end of June after selling its last franchise to Jones Intercable for $80.4 million. The Acton system covers 34,000 Anne Arundel County, Md., homes; Jones already operates an adjoining outlet with about 32,000 homes. Acton has been selling off various franchises over the past two years. At one point, the company operated properties reaching more than 75,000 subscribers. The Jones Group handled aspects of the deal.

• **Warner Cable** has agreed to pick up 15 Central and Southwestern

Cable Network Ad Performance

Mar. 1989 billings	Mar. 1988 billings	Year-to-year dollar change	Year-to-year percent change
$66,465,809	$52,193,138	$14,272,671	21.4%

Top 10 cable net sponsors/1st Quarter 1989

1. Time Inc.	$8,293,725	6. Anheuser-Busch	$4,901,738
2. Procter & Gamble	8,073,544	7. Mars Inc.	4,554,168
3. Kohlberg Kravis Roberts (RJR Nabisco)	5,372,542	8. General Motors	4,363,245
4. Philip Morris	5,204,679	9. Sears	2,840,434
5. General Mills	5,088,123	10. Pepsico	2,838,068

Source: Broadcast Advertising Reports data; figures represent combined billings of CBN, CNN, ESPN, MTV, USA and Superstation TBS

	1st Qtr. 1989 billings	1st Qtr. 1988 billings	Year-to-year dollar change	Year-to-year percent change
CBN	$22,699,833	$16,175,526	$ 6,524,307	28.7%
CNN	30,495,779	22,814,936	7,680,863	25.1%
ESPN	42,426,908	30,516,851	11,910,057	28.0%
MTV	25,320,101	17,813,939	7,506,162	29.6%
TBS	59,518,384	45,994,625	13,523,759	22.7%
USA	35,655,623	20,533,739	15,121,884	42.4%

Source: Broadcast Advertising Reports data

Subscriber Universe Estimates

	Total TV households	Cable TV households	Homes passed	Cable percent of TV households
A.C. Nielsen	90,400,000	49,537,730	N.A.	54.8%
Arbitron	90,000,100	46,627,100	N.A.	52.5%
Paul Kagan Associates	89,000,000	45,900,000	76,900,000	51.1%

Subscriber numbers as of Feb. 1989
Nielsen figures include Alaska & Hawaii

Top 100 MSO's

Rank	Multiple system operator	Basic subs						
1.	Tele-Communications Inc.	9,200,000	(4/89)	53.	U.S. Cable Corp.	154,300	(3/89)
2.	American Television & Communications Corp.	4,100,000	(4/89)	54.	Armstrong Utilities	151,800	(3/89)
3.	Continental Cablevision	2,366,297	(4/89)	55.	King Videocable	141,158	(1/89)
4.	Warner Cable Communications	1,547,000	(4/89)	56.	Triax Communications	141,000	(6/88)
5.	Storer Cable Communications	1,530,700	(1/89)	(59) 57.	Northland Communications	137,148	(4/89)
6.	Cox Cable Communications	1,501,500	(4/89)	(57) 58.	Summit Communications	136,600	(3/89)
7.	Comcast	1,453,000	(3/89)	(58) 59.	Cable Systems USA	136,500	(4/89)
8.	Cablevision Systems	1,354,936	(3/89)	60.	Bresnan Communications	127,351	(1/89)
9.	UA Cablesystems	1,339,729	(10/88)	61.	Booth Communications	119,000	(1/89)
10.	United Cable	1,287,000	(3/89)	62.	Sonic Communications	118,000	(12/88)
11.	Newhouse Broadcasting	1,145,000	(4/89)	63.	McDonald Group	115,200	(4/89)
12.	Jones Intercable/Spacelink	1,112,373	(4/89)	64.	Susquehanna Broadcasting	113,200	(2/89)
13.	Heritage Communications	1,100,000	(4/89)	65.	United Video Management	106,000	(3/89)
14.	Times Mirror Cable TV	997,156	(1/89)	66.	Midcontinent Cable Systems Co.	102,672	(8/88)
15.	Viacom Cable	955,000	(4/89)	67.	Pencor Services	100,400	(2/89)
16.	Cablevision Industries	929,000	(4/89)	68.	First Carolina Communications	99,500	(3/89)
17.	Sammons Communications	853,900	(4/89)	69.	WEHCO Video	93,900	(4/89)
18.	Century Communications	800,000	(4/89)	70.	Omega Communications	90,500	(3/88)
19.	Cooke Cablevision	726,000	(3/89)	71.	Selkirk Communications	77,500	(3/89)
20.	Adelphia Communications	720,000	(3/89)	72.	Coastal Communications	77,000	(3/89)
21.	Paragon Communications	703,000	(3/89)	73.	Gilbert Media	72,000	(12/88)
22.	Falcon Cable TV	632,500	(3/89)	74.	James Cable Partners	70,000	(4/89)
23.	Centel Cable	592,000	(3/89)	75.	Douglas Communications	64,100	(3/89)
24.	Telecable	570,000	(1/89)	76.	Barden Cablevision	62,700	(3/89)
(26) 25.	KBLCOM	558,100	(4/89)	77.	Cardinal Communications	58,900	(12/88)
(25) 26.	WestMarc Communications	554,369	(3/89)	(80) 78.	C-TEC Cable Systems	58,000	(4/89)
27.	Scripps-Howard	533,000	(3/89)	(78) 79.	Prestige Cable TV Inc.	57,500	(3/89)
28.	Multivision Cable TV	481,000	(1/89)	(79) 80.	Hearst Communications Of California	57,430	(12/88)
29.	Tele-Media	465,292	(4/89)	81.	State Cable TV	54,500	(12/88)
30.	Prime Cable	455,123	(12/88)	82.	Joseph Gans Cable TV	54,000	(12/88)
31.	Post-Newsweek Cable	400,000	(1/89)	83.	Pagnotti Inc.	52,590	(12/88)
32.	Lenfest Group	358,524	(3/89)	84.	Telesat Cablevision Inc.	52,590	(12/88)
33.	TCA Group	347,897	(1/89)	85.	Bachow & Elkin Communications	51,700	(1/89)
34.	Maclean Hunter Cable TV	331,599	(12/88)	86.	Galaxy Cablevision	51,700	(3/89)
35.	Rifkin & Associates	324,000	(4/89)	87.	Leonard Communications	51,700	(12/88)
(37) 36.	Colony Communications	310,100	(3/89)	88.	Helicon Corp.	50,000	(4/89)
(36) 37.	Multimedia Cablevision	304,000	(3/89)	89.	New England Cablevision	49,000	(4/89)
38.	TKR Cable	268,195	(12/88)	90.	Rock Associates	47,500	(3/89)
39.	Western Communications	264,900	(3/89)	91.	Donrey Media Group	47,500	(3/89)
(41) 40.	Star Cablevision Group	254,000	(1/89)	(93) 92.	CableSouth Inc.	42,100	(2/89)
(40) 41.	Cencom Cable	253,754	(3/89)	(95) 93.	CableAmerica	42,000	(2/89)
42.	Simmons Communications	246,600	(1/89)	(92) 94.	Cable Holdings Inc.	41,800	(3/89)
43.	Communications Service Inc.	228,526	(12/88)	(94) 95.	Eastern Connecticut Cable TV	41,444	(9/88)
44.	Hauser Communications	226,000	(1/89)	96.	Fanch Communications	41,000	(11/88)
45.	Service Electric Cable TV Inc.	211,500	(4/89)	97.	Acton Corp.	40,400	(3/89)
46.	Greater Media	188,800	(3/89)	98.	Star Cable Associates	40,000	(12/88)
47.	Harron Communications	177,700	(3/89)	99.	Fairbanks Communications	36,400	(3/89)
(49) 48.	Columbia International	174,000	(4/89)	100.	ParCable	36,142	(5/89)
(48) 49.	Media General	172,900	(3/89)				
50.	Palmer Communications	166,918	(3/89)				
51.	Sutton Capital	163,700	(2/89)				
52.	Insight Communications	157,700	(4/89)				

( ) **Rank last listing**

Subscriber counts are provided by MSOs and systems to Cable Vision. *Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 475 Park Avenue So., Suite 1703, New York, NY 10016.*

Top 100 Systems

Rank	Location	Operator	Basic subs						
1.	Long Island, NY	Cablevision Systems	458,453	(3/89)	50.	Wilmington, DE	Heritage	103,255	(5/88)
2.	Woodbury (Long Island), NY	Cablevision Systems	455,643	(3/89)	51.	Jefferson Parish/Kenner, LA	Cox Cable	101,919	(3/88)
3.	San Diego, CA	Cox Cable	360,000	(4/89)	52.	Boston, MA	Cablevision Systems	100,768	(3/89)
4.	Orlando/Melbourne, FL	ATC	298,000	(2/89)	53.	Pinellas County, FL	Newhouse	100,614	(6/88)
5.	Manhattan, NY	ATC	225,000	(12/88)	54.	Naples, FL	Palmer	100,344	(3/89)
6.	San Antonio, TX	KBLCOM	221,894	(12/87)	55.	Hillsborough/Tampa, FL	Paragon	100,281	(2/89)
7.	East Orange, NJ	Maclean Hunter	203,117	(5/88)	56.	Brooklyn/Queens, NY	Warner	100,000	(1/89)
8.	Puget Sound, WA	Viacom	203,000	(6/88)	57.	Tacoma, WA	Viacom	99,000	(6/88)
9.	Phoenix, AZ	Times Mirror	200,000	(10/88)	58.	Richmond, VA	Continental	97,935	(1/89)
10.	Houston, TX	Warner	196,800	(1/89)	59.	Indianapolis, IN	Comcast	97,790	(6/88)
11.	Honolulu, HI	ATC	194,000	(3/88)	60.	Tucson, AZ	Cooke	96,976	(4/89)
12.	Chicago (suburbs), IL	Continental	177,208	(2/89)	61.	Pittsburgh	TCI	96,712	(1/89)
13.	Hartford/Plainsville/Vernon, CT	United	172,289	(5/88)	62.	Escondido, CA	Times Mirror	96,519	(4/88)
14.	Wayne, NJ	UA Cablesystems	172,008	(4/89)	63.	Jackson, MS	ATC	96,000	(12/88)
15.	Cleveland, OH	Cablevision Systems	164,928	(3/89)	64.	St. Petersburg, FL	Paragon	95,412	(2/89)
16.	Louisville/Jeff. Co., KY	Storer Communications	163,722	(5/88)	65.	Dade/Broward County, FL	Storer	94,577	(5/88)
17.	Cincinnati, OH	Warner	163,552	(1/89)	66.	Worcester Complex, MA	Greater Media	92,148	(12/88)
18.	Rochester, NY	ATC	163,000	(10/88)	67.	Greensboro, NC	ATC	91,000	(12/88)
19.	Cherry Hills, NJ	NYT	162,000	(1/89)	68.	Nashville, TN	Viacom	90,000	(6/88)
20.	Denver (suburbs), CO	United	161,002	(5/88)	69.	Chicago, IL	Group W	89,500	(7/88)
21.	Hampton Roads, VA	Cox Cable	158,003	(3/88)	70.	Milwaukee, WI	Warner	88,126	(5/88)
22.	Tulsa, OK	United	157,412	(2/89)	71.	Wichita, KS	Multimedia	87,351	(1/89)
23.	Fairfax, VA	Media General	157,000	(11/88)	72.	Las Vegas, NV	Prime Cable	86,852	(5/88)
24.	Connecticut Complex	Cablevision Systems	154,727	(3/89)	73.	Orange County, CA	Times Mirror	86,607	(4/88)
25.	Atlanta, GA	Prime Cable	153,557	(3/88)	74.	Dover/Morristown, NJ	Sammons	82,871	(5/88)
26.	Jacksonville, FL	Continental Cablevision	153,000	(4/88)	75.	Portland, OR	KBLCOM	82,587	(6/88)
27.	Chicago, IL	TCI	148,857	(4/89)	76.	Harrisburg, PA	Sammons Communications	82,334	(5/88)
28.	Kansas City, MO	ATC	147,000	(2/89)	77.	Fresno, CA	Continental	82,103	(12/88)
29.	San Jose/Campbell, CA	Heritage	140,080	(1/89)	78.	Fayetteville, NC	ATC	82,000	(12/88)
30.	Memphis/W. Memphis, TN	ATC	140,000	(12/88)	79.	Orange County	KBLCOM	81,604	(1/89)
31.	Charlotte, NC	ATC	139,000	(12/88)	80.	South Bend, IN	Heritage	80,776	(5/88)
32.	Pompano, FL	Continental	136,793	(2/89)	81.	Oakland County, MI	United	80,564	(5/88)
33.	Baltimore County, MD	Comcast	136,096	(6/88)	82.	New Orleans, LA	Cox Cable	80,348	(3/88)
34.	Manhattan, NY	Paragon	136,000	(4/88)	83.	Indianapolis, IN	ATC	80,000	(12/88)
35.	St. Louis, MO	Cencom	132,992	(3/89)	84.	Independence, MO	Jones	79,897	(11/88)
36.	Buffalo, NY	Adelphia Communications	132,801	(3/88)	85.	Baton Rouge, LA	UA Cablesystems	79,586	(4/88)
37.	San Diego, CA	ATC	132,000	(12/88)	86.	Albuquerque, NM	Jones Intercable	79,199	(10/88)
38.	Martin/Stuart Co., FL	Centel	128,566	(3/89)	87.	Akron, OH	Warner	79,070	(5/88)
39.	San Francisco, CA	Viacom	123,000	(6/88)	88.	Columbus, OH	Warner	78,454	(5/88)
40.	Seattle, WA	TCI	120,518	(1/89)	89.	Allentown, PA	Service Electric	78,000	(12/88)
41.	Austin, TX	ATC	120,000	(12/88)	90.	St. Petersburg, FL	Paragon	78,000	(4/88)
42.	Warren, NJ	TKR	116,174	(2/89)	91.	Medford Complex	Warner	77,167	(5/88)
43.	Toledo, OH	Blade Communications	108,861	(5/88)		Boston Suburbs, MA			
44.	Chicago Suburbs, IL	Centel	108,326	(3/89)	92.	South Texas, TX	Heritage	77,160	(5/88)
45.	Dallas, TX	Heritage	107,680	(5/88)	93.	Pleasant Hill, CA	WestMarc	74,210	(3/89)
46.	San Juan, PR	Multivision Cable	106,450	(12/88)	94.	Providence/Warwick, RI	Times Mirror	73,605	(5/88)
47.	Southeast Michigan	Comcast	104,803	(6/88)	95.	Omaha, NE	Cox Cable	73,361	(3/88)
48.	Raleigh/Durham, NC	ATC	104,000	(12/88)	96.	Flint, MI	Comcast	72,923	(6/88)
49.	Grand Rapids, MI	UA Cablesystems	103,661	(6/88)	97.	Little Rock, AR	Storer	72,681	(5/88)
					98.	Ocean County, NJ	Adelphia	72,355	(3/88)
					99.	W. San Fernando Va., CA	CV Industries	72,164	(2/89)
					100.	Lincoln, RI	Heritage	71,625	(5/88)